



## **Evergreen Indiana Annual Conference**

**April 4, 2014**

**Presented by:**

**Vanessa Martin**

**Judi Terpening**

**Virgie Dowell**

**as part of the**

**El Patron Services Committee**

## **Intra-Evergreen Communication**

**Or**

**How to cut through the  
green tape without  
injuring anyone.**

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## Evergreen Indiana Patron Services Committee

- Who we are:
  - Virgie Dowell, Jefferson Co Public Library
  - Brandy Graves, Shelby County Public Library
  - Virginia Hilbert, Hussey-Mayfield Memorial Public Library
  - Laura Hull, Peabody Public Library
  - Laura Jones, Culver-Union Twp. Public Library
  - Virginia Jensen, Mooresville Public Library
  - Karen Jewell, Greenwood Public Library
  - Vanessa Martin, Greensburg-Decatur Co. Public Library
  - Jennifer McKinley, Morgan County Public Library
  - Sandy Rowland, Westfield Washington Public Library
  - Judi Terpening, Switzerland Co. Public Library
  - Walter Warren, Vermillion County Public Library
- How you can become involved?
  - Suggest changes/improvements you'd like to see
  - Call us if you need help with a circulation issue
  - Volunteer to replace one of us when we issue calls for volunteers



This is the Evergreen Indiana home page. Bookmark it on your PC!  
Here is the URL: <http://www.in.gov/library/evergreen.htm>

ISL: Evergreen Indiana - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Google Calendar x ISL: Evergreen Indiana x +

www.in.gov/library/evergreen.htm

http://www.in.gov/library/evergreen.htm

Indiana State Library

Expand / Collapse

**LIBRARY HOME**

- Contact Us
- About the Library
- Catalog
- Services for the General Public
- Services for Libraries
- Services for State Employees
- Collections
- Databases
- Talking Book & Braille Library
- Indiana Center for the Book
- Volunteer
- Newsroom
- Directory of Indiana Libraries
- Events & Public Workshops
- Evergreen Indiana
- Site Index

**EVERGREEN INDIANA**  
OPEN SOURCE INTEGRATED LIBRARY SYSTEM

**Online Services**

- Reference & Research Assistance
- Online Databases
- Inspire - Indiana's Virtual Library
- Online Exhibits
- The VINE (Vital Information Exchange)
- Forms.IN.gov

**MORE ONLINE SERVICES »**

**SUBSCRIBER CENTER »**

**The Evergreen Indiana Open-Source ILS Initiative**

Evergreen Indiana is a growing consortium of 104 public, school and institutional libraries located throughout Indiana that use the Evergreen ILS. Patrons of member libraries can use their Evergreen Indiana library card to view the catalogs and borrow materials from the other member libraries. For a full list of participating libraries, please visit the [Communications](#) page.

The Evergreen Indiana project is being funded by the Indiana State Library through Library Services and Technology Act (LSTA) grants. The services provided by the State Library include purchasing and maintaining the central servers, personnel costs in operating the system, training, software development, data conversion, and other related expenses.

The Evergreen Indiana Consortium is accepting applications from libraries seeking to migrate to Evergreen. Requests for membership are approved by the Executive Committee at its regularly scheduled meetings. Libraries interested in joining the consortium must have Board of Trustees approval and submit a completed Membership Application Packet. For more information about joining Evergreen Indiana, please visit the [New & Future Members](#) page.

**Evergreen Indiana Resources**

**Top FAQs**

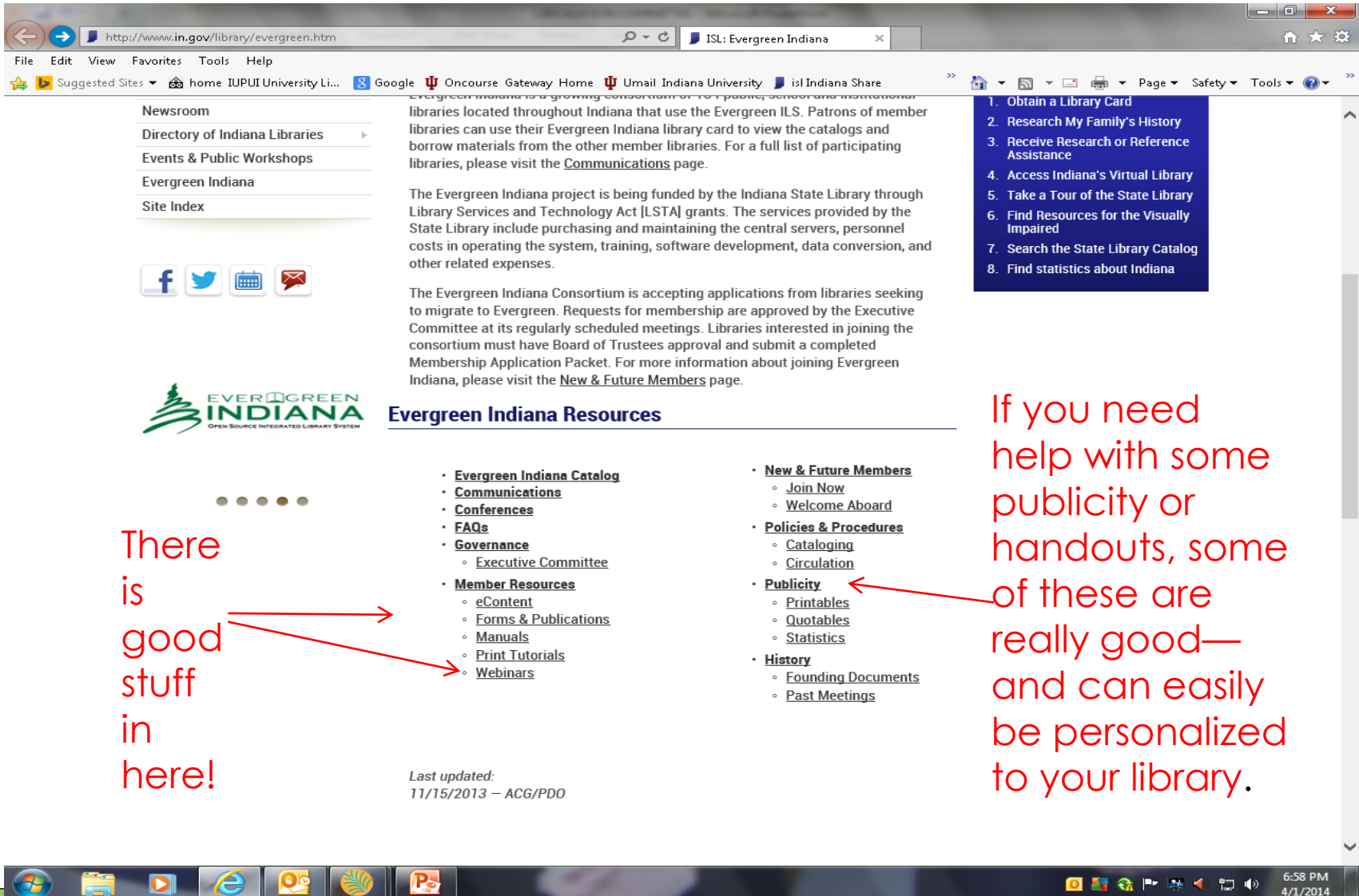
**I Want To...**

1. Obtain a Library Card
2. Research My Family's History
3. Receive Research or Reference Assistance
4. Access Indiana's Virtual Library
5. Take a Tour of the State Library
6. Find Resources for the Visually Impaired
7. Search the State Library Catalog
8. Find statistics about Indiana

**EVERGREEN INDIANA**

Windows taskbar: 2:42 PM 4/1/2014

This is the bottom half of this web page showing all the links.



The screenshot shows the bottom half of the Evergreen Indiana website. The browser address bar displays <http://www.in.gov/library/evergreen.htm>. The page features a navigation menu on the left with links to Newsroom, Directory of Indiana Libraries, Events & Public Workshops, Evergreen Indiana, and Site Index. Below the menu are social media icons for Facebook, Twitter, and YouTube. The main content area includes a paragraph about the consortium, a section titled "Evergreen Indiana Resources" with a list of links, and a sidebar on the right with a list of services. A red arrow points from the text "There is good stuff in here!" to the "Evergreen Indiana Resources" section. Another red arrow points from the text "If you need help with some publicity or handouts, some of these are really good—and can easily be personalized to your library." to the "Publicity" link in the sidebar.

**Newsroom**  
 Directory of Indiana Libraries  
 Events & Public Workshops  
 Evergreen Indiana  
 Site Index

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**Evergreen Indiana Resources**

- [Evergreen Indiana Catalog](#)
- [Communications](#)
- [Conferences](#)
- [FAQs](#)
- [Governance](#)
  - [Executive Committee](#)
- [Member Resources](#)
  - [eContent](#)
  - [Forms & Publications](#)
  - [Manuals](#)
  - [Print Tutorials](#)
  - [Webinars](#)
- [New & Future Members](#)
  - [Join Now](#)
  - [Welcome Aboard](#)
- [Policies & Procedures](#)
  - [Cataloging](#)
  - [Circulation](#)
- [Publicity](#)
  - [Printables](#)
  - [Quotables](#)
  - [Statistics](#)
- [History](#)
  - [Founding Documents](#)
  - [Past Meetings](#)

**1. Obtain a Library Card**  
**2. Research My Family's History**  
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**There is good stuff in here!**

**If you need help with some publicity or handouts, some of these are really good—and can easily be personalized to your library.**

Last updated:  
 11/15/2013 – ACG/PDO



**[http: blog.evergreen.lib.in.us/](http://blog.evergreen.lib.in.us/)**

- Latest updates
- Training opportunities
- New member libraries
- Beneficial to front line staff



## Weekly Update—March 25, 2014

🕒 March 25, 2014 📁 Annual Meeting, Classes, programs and roundtables

### EVERGREEN INDIANA ANNUAL CONFERENCE PROGRAM 2014

The 2014 Evergreen Indiana Annual Conference will be held on April 3-4, 2014. The conference will open on the evening of the 3rd with a keynote reception dinner (beginning at 6pm). The rates to participate this year are \$65 for the full conference and \$45 to participate exclusively in events on the 4th. Registration forms are available here: [EI Annual Conference Registration](#).

The conference will be held at the [Wyndham Indianapolis West](#). We have reserved a block of rooms at a discounted rate of \$89 for the night of the 3rd. When you reserve your room, please be sure to mention that you will be attending the Evergreen Indiana Annual Conference to get your discount. Once the block is gone, rooms are available on a first-come-first-served basis.

On the 4th, we'll begin at 9am. Our program calendar has been tentatively set as follows:

#### Administration Track

#### Links

[Cataloging in Evergreen Indiana](#)

[Evergreen Indiana Catalog](#)

[Evergreen Indiana homepage](#)

[ISL Training Calendar](#)

Read the updates every week. It is the best way to keep up with EI activities and changes!

## Other Valuable URLs

• <http://www.in.gov/library/5082.htm>

### Access to:

- mailing lists
- blogs
- contact lists
- member list

• <http://www.in.gov/library/5094.htm>

- Circulation Policy
- Circulation Procedures

**BOTH OF THESE DESERVE A BOOKMARK ON YOUR DESKTOP**



http://www.in.gov/library/5082.htm

File Edit View Favorites Tools Help

Suggested Sites home IUPUI University Li... Google Oncourse Gateway Home Umail Indiana University is! Indiana Share

Text Find an Agency Find a Person Account Center Online Services FAQs Help A A+

**IN.gov** A State that Works Library Search

About Indiana Agriculture & Environment Business & Employment Education & Training Family & Health Law & Justice Public Safety Taxes & Finance Tourism & Transportation

**GOVERNOR  
MIKE PENCE**

**Indiana State Library** Expand / Collapse

Library > Evergreen Indiana > Communications

### LIBRARY HOME

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### COMMUNICATIONS

The Evergreen Indiana Coordinator is available to all member and future member libraries for assistance with membership questions, policy and procedure discovery, communications with the governance committees, and training requests. Please contact the coordinator at:

Anna Goben  
Evergreen Indiana Coordinator  
Indiana State Library  
140 North Senate Avenue  
Indianapolis, IN 46204  
317-234-6624 or 1-800-451-6028  
agoben@library.in.gov

### The Helpdesk

The Indiana State Library offers technical troubleshooting assistance and systems monitoring 24/7. If an issue arises, staff at member libraries are encouraged to submit a Helpdesk ticket with all relevant details.

[Submit a Helpdesk Ticket](#)

### Mailing Lists

The consortium offers 5 interactive mailing lists to address a variety of issues and collaborations across the consortium. We encourage all interested Evergreen Indiana member library staff to subscribe to any or all of these listservs.

- Evergreen eContent:** Supports the eIndiana Digital Consortium, a sub-group of Evergreen Indiana libraries, for sharing electronic resource content.
- Evergreen Indiana Catalog:** Supports the Tech Services and Cataloging

### Online Services

- Reference & Research Assistance
- Online Databases
- Inspire - Indiana's Virtual Library
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**MORE ONLINE SERVICES »**  
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### Top FAQs I Want To...

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Every Circ Super should be on a listserv.

f t c e



6:49 PM 4/1/2014





## Indiana State Library

Library > Evergreen Indiana > Policies & Procedures > Circulation Policies & Procedures

### LIBRARY HOME

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## CIRCULATION POLICIES & PROCEDURES

The Evergreen Indiana Circulation Policies and Procedures have been developed by the Patron Services Committee, a subcommittee supporting the Executive Committee. These policies adhere to Indiana State Law and are representative of service standards throughout the consortium. Policies and procedures are regularly reviewed, updated, and reapproved by the governing bodies. Assistance with interpreting the policies and procedures may be sought from the support listservs, the Patron Services Committee members, or the Evergreen Indiana Coordinator (please visit the [Communications](#) page for contact information).

• [Evergreen Indiana Circulation Policy](#) [Updated October 2013]

• [Evergreen Indiana Circulation Procedures](#) [Updated October 2013]  
• [Evergreen Indiana Circulation Matrix](#) [Updated February 2014]

See also [Circulation Training Manual](#)

Last updated:

2/27/2014 - AC6/PDO

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Print these docs for front desk staff or make sure they know where to find them.



## ICKY-STICKY EVERGREEN SITUATION #1

A patron moves from Greenwood to Vevay and wants a card at his new place of residence. What now?

**We will demonstrate!**

(insert playlet here)

- \* **Look him up in Evergreen to verify that he has a card.**
- \* **Verify his ID and get proof of residence as usual**
- \* **Using his old evergreen account from Greenwood, issue him a new card from your library. Simply delete his old number, scan in the new one and change everything that needs to be changed.**
- \* **DO NOT make a new record for him. That only means a merge later, which is time and effort that somebody on your staff wants to avoid!**

## ICKY STICKY EVERGREEN SITUATION #2

Patron from Madison wants to use her EI card at Greensburg. She has fines at Madison over the \$10 limit. Can she still check out? If so, how?

**Watch this!**

(Insert playlet here)

- \* **Look carefully at the billing screen to see whether the bill is for lost items or just fines. (See “Full Details” under “Actions for Selected Transactions” if you are not sure.)**
- \* **If lost materials are involved, call the owning library to get the correct billing information. Library procedures here may be different from your library’s.**
- \* **If the bill is only fines for late returns, accept payment and give the patron a receipt. Some libraries accept debit/credit cards, and patrons can pay that way if your library is set up to accept cards. If not, cash and checks are good, too! Patrons can now also pay online through the “My account” feature.**
- \* **Check patron out as you normally would.**

## ICKY-STICKY EVERGREEN SITUATION #3

Patron has a card from Switzerland County but is checking out at Madison. When front desk staff scans the card, he finds a bill of \$63.49 on the patron's card. It is for 2 damaged books belonging to Greensburg. HELP! Now what do I do?

**Glad you asked! We're going to show you.**  
(Insert playlet here)

- \* **Tactfully inform patron that s/he owes another library \$63.49. Deal with patron denial/shock.**
- \* **After patron remembers that daughter spilled coffee on two books, call Greensburg and ask whether amount is correct. If not, ask them to make adjustments to the account. Refresh account.**
- \* **Now you can accept payment either by check, card or cash according to the parameters set by your library.**
- \* **Give the patron a receipt.**

## **ICKY-STICKY EVERGREEN SITUATION #4**

**Patron wants to check out at Greensburg, but he has a card from Switzerland County and it is expired. What should I do?**

**We know! We know!**  
**(Now watch the proof)**

- \* Ask patron for his/her photo ID so you can renew his card. Make sure it is valid and has his current address.**
- \* If his photo ID is good and shows the same address as his Switzerland County card, you can renew his EI library card.**
- \* If he cannot produce proper photo identification or it is not the address shown on his record, then he needs to present the proper ID and proof of residence at Switzerland County to have his card renewed.**

## **ICKY-STICKY EVERGREEN SITUATION #5**

**Patty Patron returns a lost item to Mitchell Public Library but it belongs to Jennings County Public Library. What do you do?**

**Ooh! Ooh! Ask us!**  
**(Now watch the proof)**

- \* Check in the item and explain to the patron that it has been marked lost.**
- \* Find the appropriate person listed on the Circulation Contact List for Jennings County and call him or her.**
- \* Relay the owning library's lost item return policy to the patron.**
- \* Accept payment if offered.**



# *That's All Folks!*

**If you have questions or need help, contact us:**

- **Anna Goben is the Evergreen Indiana Coordinator and answers her emails promptly at [AGoben@library.IN.gov](mailto:AGoben@library.IN.gov)**
- **Judi at 812.427.3363 or [jterpening@scpl.us](mailto:jterpening@scpl.us)**
- **Vanessa at 812.663.2826 or [vmartin@greensburglibrary.org](mailto:vmartin@greensburglibrary.org)**
- **Virgie at 812.265.2744. or [circsup@mjcpl.org](mailto:circsup@mjcpl.org)**